

Burlington-Edison School District No. 100

Burlington, Washington

Skagit County

2011 Six-Year Capital Facilities Plan

Adopted: _____, 2011

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I. Executive Summary:

This Six-Year Capital Facilities Plan (the "Plan") has been adopted by the Burlington-Edison School District (the "District") as the District's principal planning document in compliance with the requirements of Washington's Growth Management Act. The Plan has been prepared using data available through August 2011.

The Plan is consistent with prior long-term capital facilities plans of the District. In addition to this Plan, the District may from time to time prepare other short-range and long-range plans that identify the new needs for capital improvements. Any such plans will be consistent with this Six-Year Capital Facilities Plan and adopted Board policies.

Currently, the District is receiving school impact fees from developments in Skagit County for projects located in the unincorporated portion of Skagit County within the District's boundaries and school impact fees from developments in the City of Burlington for projects located within the city limits.

Pursuant to the requirements of the Growth Management Act, this Plan will be updated on a regular basis and any charges in the fee schedules will be adjusted accordingly.

The Plan refers to the District's "standard of service" in order to ascertain the District's current and future capacity. The District establishes its standard of service based on enrollment profiles, program needs, and any other determinations as deemed appropriate by the Board. (See Section III for a more detailed explanation of the District's standard of service.)

The District's 2010-11 permanent capacity is 3,150, whereas the headcount student enrollment on October 1, 2010, was 3,842 (3,684 FTE). The District is using relocatable facilities to house students in the interim period until new permanent facilities become available.

II. Six-Year Enrollment Projections:

Since the 2002-03 school year, the District's student population has increased from 3,585 to 3,842 (headcount enrollment), a 7% increase. (See Appendix I.) The District experienced rapid student growth between 2002 and 2007. However, in the past three years, the District's enrollment has slightly declined by about -1.8%. Based on the current forecast, the District's student enrollment is projected to increase by approximately 106 students over the next six years. This is a 2.8 percent increase over the District's current student population. Enrollment increases are primarily expected at the District's K-8 grade levels. The District's long term enrollment projections show a more robust pattern of growth. A table containing the District's six-year enrollment projections is set forth in Appendix I.

These District's enrollment projections were prepared with the assistance of a professional demographer. The projections are based on a methodology for forecasting future enrollments. This methodology, a modified cohort survival method, considers a variety of factors to evaluate the potential student population growth for the years 2010 through 2024. These factors include: Office of the Superintendent of Public Instruction data regarding enrollment history by year and grade and other statistical data regarding District-specific enrollment trends; Washington State Health Department and birth statistics (for purposes of predicting kindergarten enrollments); and data regarding known new developments being proposed within the Burlington-Edison School District. The projections run through 2025. Generally, enrollment projections using historical calculations are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions, land use, and demographic trends in the area affect the projection. Monitoring birth rates in the County and population growth for the area are essential yearly activities in the ongoing management of the CFP. In the event that enrollment growth slows, plans for new facilities can be delayed. It is much more difficult,

however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projections.

Enrollment growth over the next six years is expected to occur primarily at the K-8 level. The District plans to closely monitor growth and will update this Plan as circumstances change. There is the potential for an approximately 1,500 unit residential development in the area near Bay View Elementary. Currently, this school is over capacity and the District would need to identify additional permanent capacity to serve students from the new development.

III. Current District Standard of Service:

Each school district must establish a standard of service in order to determine the instructional space available within existing school facilities and the District's overall capacity. The District has established a class size standard of 25 students per classroom. Relocatable classrooms are utilized in the District and will continue to serve as interim facilities. However, they are not included in the calculation of the District's permanent capacity. The standard of service defined herein may change significantly as student population changes and the District is challenged to educate a larger population of students with significant special needs that require special services.

Other space needs in all school buildings include libraries, gymnasiums, and other core facilities, areas for special programs on an as-needed basis, as well as space for teachers to plan and to provide materials for the classrooms. In addition, school building space is needed for special programs, including special education instruction, ESL programs, music, art, and computer labs.

IV. Inventory of Existing Capital Facilities:

The following list identifies the existing capital facilities of the District and the number of permanent classrooms per school. Using the standard of service of 25 students per classroom, the permanent capacity of each school and the permanent capacity of the District are identified in the far right-hand column of Table A.

TABLE A: EXISTING PERMANENT CLASSROOM CAPACITY

<u>Facility</u>	<u>Address</u>	<u>Size</u>	<u>Permanent Capacity</u>
Edison Elementary	577 Main Avenue, Edison	15 classrooms	375
Allen Elementary	1517 Cook Road, Bow	16 classrooms	400
Bay View Elementary	1323 Wilson Road, Burlington	15 classrooms	375
West View Elementary	515 West Victoria, Burlington	16 classrooms	400
Lucille Umbarger Elementary	820 S. Skagit St., Burlington	26 classrooms	650
Burlington-Edison High School	301 N. Burlington Blvd., Burlington	38 classrooms	950
Total available district-wide capacity		126 classrooms*	3,150

*Depending upon programmatic needs, regular classroom space at a particular school may be used for special programs and services. In such cases, regular classroom capacity needs may be provided for in relocatable facilities.

V. Current and Future Capital Facilities Needs and Financing Plan:

The District plans to add capacity at West View Elementary and to add portable facilities at Allen, Edison, and West View Elementary during the six year planning period. Recent and continuing enrollment growth related to new development necessitates this additional elementary capacity. Subject to future planning and voter approval, the District may need to construct a new elementary school and additional capacity at the high school level in order to accommodate capacity needs. The District will need to identify suitable property for the new elementary school. In addition, the District plans to remodel West View Elementary School and perform other remodel and maintenance projects at schools throughout the District.

In terms of undeveloped properties, the District owns 1.13 acres adjacent to Bay View Elementary School, 9.4 acres adjacent to the existing Burlington-Edison High School, 9.25 acres on Peacock Lane in Burlington, 16 acres adjacent to the Allen Elementary in Bow, 20 acres on Bow Hill in Bow, and 27 acres located at Peterson Road/Pulver Road. Current flood regulations prohibit the development of the property adjacent to Allen Elementary, wetland regulations prohibit the development of the Bow Hill property, and the Peterson Road/Pulver Road property is subject to zoning constraints.

The construction of additional school facilities or the acquisition of other school sites will require the voters to approve a bond issue or a capital levy. State matching funds and impact fee revenue are also expected to assist the District's financing needs.

Based upon the District's capacity data and enrollment projections, as well as the student generation data, the District has determined that a significant portion of its needed capacity improvements are necessary to serve students generated by recent and continuing new development, with the remaining additional capacity required to address existing needs.

TABLE B: CAPITAL FACILITIES FINANCING PLAN

Project	Status	Projected Completion Date	Total New Capacity	Projected Cost	Funding Source
New K-8 School Site Acquisition	Planning	---	425	\$2,500,000	Future Bond/Levy, Impact Fees
Expansion of West View Elementary	Planning	2016	162	\$1,053,000	Future Bond/Levy, Impact Fees
Bay View Maintenance	Planning	---	---	\$960,000	Future Bond/Levy
Edison Maintenance	Planning	---	---	\$155,000	Future Bond/Levy
Allen Maintenance (paint)	Planning	---	---	\$30,000	Future Bond/Levy
Lucille Umbarger Maintenance (paint, gym lights)	Planning	---	---	\$50,000	Future Bond/Levy
Elementary Portables	Planning	2014-15	162	\$650,000	Impact Fees, Other Capital Funds
West View Remodel	Planning	---	---	\$8,458,586	Future Bond
High School Remodel (commons, cafeteria, gym)	Planning	---	---	\$31,600,000	Future Bond

VI. Projected Classroom Capacities:

Based on the District's enrollment forecasts, current standard of service, and current inventory and capacity space, the District does not have sufficient permanent capacity district-wide to house students at the elementary or high school level. The District will add permanent capacity at the elementary level during the six years of this plan, but will still need to use relocatable facilities at both levels to provide interim capacity. *Future plan updates may include the addition of permanent capacity at the elementary and high school levels.*

The enrollment projected for the next six years is as follows:

TABLE C: PROJECTED ENROLLMENT AND CAPACITY BY YEAR:
(These charts combine the information in Table A with the enrollment projections in Appendix II.)

Table C-1: K-8 School Surplus/Deficiency

	Actual October 2010	2011	2012	2013	2014	2015	2016
Existing Permanent Capacity	2,200	2,200	2,200	2,200	2,200	2,200	2,200
Added Capacity							162
Relocatable Capacity**	425	425	425	425	587	587	587
Total Capacity	2,625	2,625	2,625	2,625	2,787	2,787	2,949
Enrollment*	2,498	2,520	2,549	2,576	2,632	2,640	2,675
Surplus (Deficiency) Total Capacity	127	105	76	49	155	147	274
Surplus (Deficiency) Permanent Capacity	(298)	(320)	(349)	(376)	(432)	(440)	(313)

*FTE enrollment

**Relocatable facilities are not considered a permanent capacity solution.

Table C-2: High School Surplus/Deficiency

	Actual October 2010	2011	2012	2013	2014	2015	2016
Existing Permanent Capacity	950	950	950	950	950	950	950
Added Capacity							
Relocatable Capacity**	275	275	275	275	275	275	275
Total Capacity	1,225	1,225	1,225	1,225	1,225	1,225	1,225
Enrollment*	1,186	1,155	1,129	1,119	1,107	1,121	1,118
Surplus (Deficiency) Total Capacity	39	70	96	106	118	104	107
Surplus (Deficiency) Permanent Capacity	(236)	(205)	(179)	(169)	(157)	(171)	(168)

*FTE enrollment

**Relocatable facilities are not considered a permanent capacity solution.

VII: Impact Fee Formula and Schedules:

The Growth Management Act authorizes jurisdictions to collect impact fees to supplement funding of additional public facilities needed to accommodate new development. Impact fees cannot be used for the operation, maintenance, repair, alteration, or replacement of existing capital facilities used to meet existing service demands. Skagit County and the City of Burlington have each adopted school impact fees ordinances and fees are collected to the time of building permit issuance.

New residential developments built within the District's boundaries will generate additional students. These students will create the need for new or expanded schools and student transportation. New growth should pay a part of the cost of the facilities needed to serve growth. Through the use of a student generation rate, the impact fee formula ensures that each dwelling unit only pays a proportionate share of the costs of new capacity projects necessary to serve new development.

The impact fee formula, included herein as Appendix II, takes into account the cost of the new capacity improvements identified in this Plan for the next six years. It calculates the cost per dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development. The fiscal impact of each single family or multi-family development in the District are based on projected student generation rates for single family and multi-family dwelling units. For additional information regarding the student generation rate data, see Appendix III. As required under the GMA, credits have also been applied in the formula to account for State Match funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit.

The following projects are included in the impact fee calculation:

- Construction of a additional permanent capacity at West View Elementary;
- Portable classroom additions at the elementary level.

Due to the relatively low cost of the planned capacity improvements, the impact fee formula does not generate an impact fee. The District intends to closely monitor enrollment growth from new development in the District and, in future plan updates, may include the costs related to additional elementary and high school capacity in the fee formula. These additional capacity costs could result in a future impact fee.

Please see Table B for relevant cost data related to each capacity project.

SCHOOL IMPACT FEE SCHEDULES

Impact Fee per Single Family Dwelling Unit	\$ 0
Impact Fee per Multi-Family Dwelling Unit	\$ 0

APPENDIX I
ENROLLMENT HISTORY & ENROLLMENT PROJECTIONS

Prepared:
13-Apr-11

BURLINGTON-EDISON SCHOOL DISTRICT
ENROLLMENT PROJECTION
INDIVIDUAL GRADE LEVEL
2011 TO 2013

October Head Count Enrollment - Excludes Running Start

COHORT GROWTH FACTORS
FACTOR Year/Level Rate

	2002	2003	2004	2005	2006	2007	2008	2009	2010		2011	2012	2013
K	255	250	282	275	320	283	275	295	317		299	311	325
1	271	264	264	313	278	317	295	290	312	105.8%	335	317	329
2	297	271	286	282	301	284	318	298	278	99.3%	310	333	314
3	272	298	287	303	302	305	287	307	283	98.1%	273	304	327
4	293	288	307	278	289	295	326	287	310	100.4%	284	274	305
5	300	295	301	308	296	292	307	317	274	101.0%	313	287	277
6	259	305	296	319	314	301	303	300	303	99.6%	273	312	286
7	289	279	319	299	318	318	293	300	284	98.6%	299	269	307
8	270	276	282	329	307	315	320	283	295	99.6%	283	298	268
Subtl	2,506	2,526	2,624	2,706	2,725	2,710	2,724	2,677	2,656		2,669	2,704	2,738
9	308	304	318	309	357	330	338	341	296	107.1%	316	303	319
10	285	283	308	325	280	344	323	309	313	93.8%	278	296	284
11	248	266	277	290	306	257	313	303	290	93.1%	291	258	276
12	238	210	243	248	279	274	264	280	287	93.0%	270	271	240
Subtl	1,079	1,063	1,146	1,172	1,222	1,205	1,238	1,233	1,186		1,155	1,129	1,119
TOTALS	3,585	3,589	3,770	3,878	3,947	3,915	3,962	3,910	3,842		3,824	3,833	3,857
Change	4	181	108	69	-32	47	-52	-68			-18	9	24
% Change	0.11%	5.04%	2.86%	1.78%	-0.81%	1.20%	-1.31%	-1.74%			-0.48%	0.24%	0.64%

Prepared:
13-Apr-11

BURLINGTON-EDISON SCHOOL DISTRICT
 ENROLLMENT PROJECTION
 INDIVIDUAL GRADE LEVEL
 2014 TO 2025
 October 1 Head Count Enrollment - Excludes Running Start

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
K	306	308	310	312	314	316	318	320	322	324	326	329
1	344	324	326	328	330	332	335	337	339	341	343	345
2	327	341	322	324	326	328	330	332	334	336	339	341
3	308	321	335	315	318	320	322	324	326	328	330	332
4	328	310	322	336	317	319	321	323	325	327	329	331
5	308	331	313	325	339	320	322	324	326	328	330	333
6	275	307	330	312	324	338	319	321	323	325	327	329
7	282	272	303	325	307	319	333	314	316	318	320	322
8	306	281	271	301	324	306	318	332	313	315	317	319
Subtl	2,785	2,794	2,831	2,879	2,899	2,898	2,918	2,927	2,925	2,944	2,963	2,982
9	287	328	301	290	323	347	328	341	356	335	337	340
10	299	269	308	282	272	303	326	307	320	334	314	316
11	265	278	251	286	262	253	282	303	286	298	311	293
12	256	246	259	233	266	244	235	262	282	266	277	289
Subtl	1,107	1,121	1,118	1,091	1,123	1,147	1,170	1,213	1,243	1,232	1,239	1,237
Totals	3,892	3,916	3,948	3,970	4,023	4,045	4,088	4,140	4,168	4,176	4,201	4,219
Change	1	24	32	22	52	23	43	52	28	8	26	18
% Change	0.03%	0.62%	0.83%	0.56%	1.32%	0.56%	1.05%	1.28%	0.65%	0.19%	0.61%	0.42%

APPENDIX II
IMPACT FEE CALCULATIONS

SCHOOL IMPACT FEE CALCULATIONS							
DISTRICT	Burlington-Eaton School District						
YEAR	2011						
JURISDICTION	City of Burlington and Stoddard County						
School Site Acquisition Cost							
(((Acres x Cost per Acre) / Facility Capacity) x Student Generation Factor)							
	Facility Acreage	Cost/Acre	Facility Capacity	Student Factor SFR	Student Factor MFR	Cost/SFR	Cost/MFR
Elementary	15.00	\$ -	425	0.234	0.234	\$0	\$0
High	40.00	\$ -	475	0.147	0.026	\$0	\$0
					TOTAL	\$0	\$0
School Construction Cost							
(((Facility Cost / Facility Capacity) x Student Generation Factor) x (permanent / Total Sq Ft))							
	%Perms/ Total Sq.Ft.	Facility Cost	Facility Capacity	Student Factor SFR	Student Factor MFR	Cost/SFR	Cost/MFR
Elementary	92.33%	\$ 1,053,000	162.5	0.234	0.234	\$1,998	\$1,400
High	92.33%	\$ -	475	0.147	0.026	\$0	\$0
					TOTAL	\$1,998	\$1,400
Temporary Facility Cost							
(((Facility Cost / Facility Capacity) x Student Generation Factor) x (Temporary / Total Square Feet))							
	%Temp/ Total Sq.Ft.	Facility Cost	Facility Size	Student Factor SFR	Student Factor MFR	Cost/SFR	Cost/MFR
Elementary	7.67%	\$650,000.00	162.5	0.234	0.234	\$102	\$72
High	7.67%	-	200	0.147	0.026	\$0	\$0
					TOTAL	\$102	\$72
State Matching Credit:							
Boeich Index X SPI Square Footage X District Match % X Student Factor							
	Boeich Index	SPI Footage	District Match %	Student Factor SFR	Student Factor MFR	Cost/SFR	Cost/MFR
Elementary	\$ 183.78	96	52.60%	0.234	0.234	\$3,100	\$2,172
Sr. High	\$ 183.78	130	0.00%	0.147	0.026	\$0	\$0
					TOTAL	\$3,100	\$2,172
Tax Payment Credit:							
Average Assessed Value						SFR	MFR
\$240,000						\$240,000	\$109,000
Capital Bond Interest Rate						4.19%	4.19%
Net Present Value of Average Dwelling						\$1,928,323	\$675,784
Years Amortized						10	10
Property Tax Levy Rate						\$1.77	1.77
Present Value of Revenue Stream						\$3,412	\$1,550
Fee Summary:							
				Single Family	Multi-Family		
				\$0	\$0		
				\$1,998	\$1,400		
				\$102	\$72		
				(\$3,100)	(\$2,172)		
				(\$3,412)	(\$1,550)		
				FEE (AS CALCULATED)			
				(\$4,412)	(\$2,250)		
				FEE			
				\$0	\$0		

APPENDIX III
STUDENT GENERATION RATES

Michael J. McCormick FAICP

Planning Consulting Services • Growth Management • Intergovernmental Relations

October 28, 2010

Memorandum

To: John Leander
Burlington-Edison School District

From: Mike McCormick

Re: Burlington-Edison S.D. 2010 Student Generation Rates (SGR)

This memorandum contains the 2010 Student Generation Rates (SGR) for both single family and multiple family residential development for the Burlington-Edison School District.

The methodology used to produce these rates is consistent with the methodology previously developed and successfully applied for a number of school districts in western Washington, including previous analysis prepared for other Skagit County school districts. The rates have been calculated for single family and multiple family residential development. The survey area included all of the territory within the boundary of the Burlington-Edison School District. The analysis is based on residential projects constructed between 2005 through 2009. The primary sources of information are the Skagit County Assessor's Office and the school district.¹

The analysis involved comparing current student addresses with the street address for all residential development the calendar years 2005 through 2009. The addresses of each of these developments was matched with student addresses from the 2009-2010 school year. This data was aggregated to show the number of students in each of the grade groupings for each type of residential development.² The SGR were calculated on a 100% sample of all single and multi-family residential development constructed between 2005 and 2009.

¹ The data acquired from the county contained a variety of information including parcel number, street address, year built, and a identification number which reveals type of residential structure. The school district provided data containing the street address and grade level for each student.

² For the purposes of this analysis, single family includes single family (detached stick-built and attached units) and manufactured homes. Multiple family includes duplexes and larger complexes. This is consistent with how Skagit County differentiates between single family and multiple family.

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Burlington-Edison School District 2010 Student Generation Rates
October 28, 2010
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The analysis is built on a comparison of the street addresses of the new developments with the current street addresses of each of the district's students from the 2009-2010 school year which produces a record of each unit occupied by a student. This information was aggregated into the two grade groupings and produced student generation rates for single family and multiple family. The resulting calculations are presented below and in a summary table attached to this report. The attached summary tables include individual grade counts of students by residential type and the total number of units in each type. A summary of the results are presented in the following table.

	Single Family	Multiple Family
Elementary (K-8)	0.334	0.234
High (9-12)	0.147	0.026
Total ³	0.482	0.260

Attachment: Table - 2010 Burlington-Edison School District Student Generation Rates

³ Totals may not balance due to rounding.

2010 Burlington-Edison School District Student Generation Rates

October 28, 2010

SINGLE FAMILY

	# of students	SGR
Elementary -- K through 8	145	0.334
High School -- 9 through 12	64	0.147
Total	209	0.482

MULTIPLE FAMILY

	# of students	SGR
Elementary -- K through 8	18	0.234
High School -- 9 through 12	2	0.026
Total	20	0.260

Grade	SF	MF
	Combined #	Combined #
K	19	2
1	20	1
2	17	3
3	19	2
4	12	4
5	18	2
6	9	
7	18	3
8	13	1
9	24	1
10	15	
11	14	1
12	11	
Total	209	20
Total Units	434	77